*ABOUT YOU*

|  |  |  |  |
| --- | --- | --- | --- |
| Mr/Mrs/Ms/Other |  |  Full Name |  |

|  |  |
| --- | --- |
| Have you ever been known by any other name and do you have any assets in a different name? |  |

|  |  |
| --- | --- |
| Full Address |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date of Birth |  / /  | Place of Birth |  | Occupation |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Telephone No |  Home |  |  Mobile |  |

|  |  |
| --- | --- |
| Email |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Do you have an existing Will? |  |  Where is it held? |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Marital Status |  | Have you been married or in a civil partnership before? |  |

|  |  |
| --- | --- |
| Do you intend to marry/re-marry in the near future? |  |

*YOUR SPOUSE/PARTNER*

|  |  |  |  |
| --- | --- | --- | --- |
| Mr/Mrs/Ms/Other |  |  Full Name |  |

|  |  |
| --- | --- |
| Has he/she ever been known by any other name |  |

|  |  |
| --- | --- |
| Full Address |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date of Birth |  / /  | Place of Birth |  | Occupation |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Telephone No |  Home |  |  Mobile |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Email |  | Do they have an existing Will? |  |

*INHERITANCE TAX*

|  |  |
| --- | --- |
| Are your combined assets including joint assets more than £325,000? If so, how much are they worth? |  |

*ASSETS/LIABILITIES*

|  |  |
| --- | --- |
| Do you own/co-own any property outside the UK? |  |

|  |  |
| --- | --- |
| Have you made a Will in any country outside the UK? |  |

Please list your main assets: (e.g. house, bank accounts, shares and value in broad terms)

|  |
| --- |
|  |

Do you have an interest in a business?

Do you have an interest in a trust?

Have you made any lifetime gifts?

|  |
| --- |
|  |

List any liabilities (e.g. mortgages, loans, credit cards, car loans etc.)

|  |
| --- |
|  |

*EXECUTORS*

Who do you wish to appoint as your executors? (ideally 2 and no more than 4)

|  |  |
| --- | --- |
| Would you like to appoint Scott Rowe as your executors?(either alone or jointly with family) | Yes / No |

|  |  |  |
| --- | --- | --- |
| Full Name | Address (including postcode) | Date of Birth |
|  |  |   / / |
|  |
|  |  |   / / |
|  |
|  |  |   / / |
|  |

*CHILDREN*

Please provide full name, addresses and dates of birth of all children to include children adopted by you

|  |  |  |
| --- | --- | --- |
| Full Name | Address (including postcode) | Date of Birth |
|  |  |   / / |
|  |
|  |  |   / / |
|  |
|  |  |   / / |
|  |
|  |  |   / / |
|  |
|  |  |   / / |
|  |

Would you like to appoint any Guardian(s) for children under 18? If so who?

|  |  |  |
| --- | --- | --- |
| Full Name | Address (including postcode) | Date of Birth |
|  |  |  / / |
|  |  |  / / |

# *YOUR STEP-CHILDREN /CHILDREN OF PARTNER*

|  |  |  |
| --- | --- | --- |
| Full Name | Address (including postcode) | Date of Birth |
|  |  |  / / |
|  |  |  / / |
|  |  |  / / |
|  |  |  / / |

***GRAND CHILDREN***

|  |  |  |
| --- | --- | --- |
| Full Name | Address (including postcode) | Date of Birth |
|  |  |  / / |
|  |  |  / / |
|  |  |  / / |
|  |  |  / / |

*SPECIFIC GIFTS e.g. JEWELLERY, PERSONAL EFFECTS, LAND, etc.*

|  |
| --- |
|  |

*GIFTS OF MONEY*

*BENEFICIARIES*

Rest of estate to pass to/be shared equally/unequally between:

In the event of the above beneficiary/beneficiaries predeceasing me I would like my estate to pass to/be shared equally/unequally between:

*FUNERAL WISHES*

Special directions regarding your funeral e.g. burial/cremation/ashes etc.

|  |
| --- |
|  |

*ACCOUNTANTS*

Do you use an accountant? If so please provide the name and address:

|  |  |
| --- | --- |
| Full Address |  |